

# Retiree Casualty Assistance Checklist

If you died tomorrow, would your Family know what to do? You can help your Family today by filling out the following checklist and making sure that your Family knows where to find it.

## RETIREE INFORMATION

Name: \_\_\_\_\_  
 Social Security number: \_\_\_\_\_  
 Date and place of birth: \_\_\_\_\_  
 Date of retirement: \_\_\_\_\_  
 Retired grade/rank: \_\_\_\_\_

## SURVIVOR BENEFIT PLAN

(Circle any that apply)

Enrolled in: **RSFPP** **SBP** **RCSBP**  
 Did you disenroll? **YES** **NO**  
 VA CLAIM #: \_\_\_\_\_  
 Eligible to draw VA disability compensation: **YES** **NO**  
 Receiving Social Security: **YES** **NO**  
**If YES**, age first received: Years: \_\_\_\_\_ Months: \_\_\_\_\_  
 Organ donor: **YES** **NO**

## SPOUSE INFORMATION

Name: \_\_\_\_\_  
 Date of birth: \_\_\_\_\_  
 Social Security number: \_\_\_\_\_  
 Date of marriage: \_\_\_\_\_  
 Place (City, County, State): \_\_\_\_\_

## INSURANCE POLICIES

Policy #: \_\_\_\_\_  
 Company: \_\_\_\_\_  
 Amount (include "as of " date): \_\_\_\_\_  
 Beneficiary: \_\_\_\_\_  
 Agent phone/email: \_\_\_\_\_

## INVESTMENTS

Type (IRA, CD, Mutual Fund): \_\_\_\_\_  
 Amount (include "as of " date): \_\_\_\_\_  
 Agent phone/email: \_\_\_\_\_

## BANK ACCOUNTS

Bank & phone/website: \_\_\_\_\_  
 Type of acct: \_\_\_\_\_  
 Amount (include "as of " date): \_\_\_\_\_  
 Account #: \_\_\_\_\_

## BURIAL INFORMATION

I would like to be: **Buried** **Cremated**

### Who should be notified of your death:

Name: \_\_\_\_\_

Relationship: \_\_\_\_\_

Address: \_\_\_\_\_

Phone #: \_\_\_\_\_

Name of cemetery where you want to be buried or have your ashes inurned: \_\_\_\_\_

Do you want to be buried in your uniform? **YES** **NO**

Do you want a funeral? **YES** **NO**

If YES, where? \_\_\_\_\_

Do you have a preference of funeral home? **YES** **NO**

If YES, which one? \_\_\_\_\_

Do you want a military honor guard? **YES** **NO**

Though this is a difficult time, it's crucial that Family members know how to report the death of a military Retiree accurately and promptly to the Defense Finance and Accounting Service (DFAS). Please report the retired service member's death as soon as possible. This will help avoid delay and possible financial hardship to surviving beneficiaries, Family members or Executors, who will be required to return any unearned military retirement payments. Eligibility for military retired pay ends with the death of the Retiree. Therefore, if a retired pay payment was issued for the month in which the Retiree died the bank will be notified to return the payment upon notification of death. The beneficiary of the arrears of pay may be due a prorated amount for the month of death. Never return money yourself unless specifically asked to.

## How to Report a Retiree's Death to DFAS

1. Complete a Notification of Death Fast Form. This form can be completed online at <http://www.dfas.mil/retiredmilitary/survivors/Retiree-death.html>. Upon notification, DFAS will stop monthly payments to prevent overpayment.
2. Within 7-10 business days after reporting the death to DFAS, you should receive a letter containing the following documents:
  - SF Form 1174 ( Claim for Unpaid Compensation of Deceased Member of the Uniformed Service
  - Annuity account forms and instructions (if the decedent was enrolled in the Survivor Benefit Plan or the Retired Serviceman's Family Protection Plan)
3. Complete the forms you received with your letter and return them with a copy of the Retiree's Death Certificate that includes cause of death to:

### DFAS U.S. Military Retired Pay

P.O. box 7130

London, KY 40742-7130

Fax: 800-469-6559

**If you need assistance completing your claim forms, please call DFAS at 1-800-321-1080 or the Fort McCoy Retirement Services Office at 608-388-3716.**